

Tax Incremental District Base Year Packet Checklist

Use this checklist as a guide to assemble the items that must be submitted with the base value application.

- ☐ 1. Equalized Value Determination Request – (PE-606)
This must be signed by the clerk. See instructions on the back of the form.
- ☐ 2. Legal Requirements Forms – (PE-605)
See instructions on the back of the form.
- ☐ 3. TID Parcel Lists – Assessable Property (PE-608)
City-owned Property (PE-619)
State Assessed Manufacturing Property (PE-608M)
Annexed property must be reported on a separate form and indicate the town from which they are annexed. See instructions on reverse side of each form.
- ☐ 4. TID Base Year Personal Property List – TID Base Year Personal Property (PE-601A)
State Assessed Manufacturing Personal Property (PE-608MP)
Forms are to be completed by the assessor and should only include property within the TID. Annexed personal property must be reported on a separate form and indicate the town from which they are annexed. See instructions for PE-608MP on reverse side of form.
- ☐ 5. TID Final Report and Special District Supplement – (PE-617A)
Instructions are on the back of the form. The assessor **must** sign it on the front.
- ☐ 6. TID Statement of Assessment – (PE-615A)
The instructions are on the back of the form. The clerk **must** sign it on the back near the bottom.
- ☐ 7. Proof of Publication for Public Hearing – 2 consecutive at least 7 days prior to public hearing.
Include copies of required public hearing notices and an **affidavit** of publication from the publishing newspaper.
- ☐ 8. Copy of Notice to Property Owners
Provide copies of the notice to the property owners whose property was found to be blighted or in need of rehabilitation. A sample of the notice sent with a list of those to whom it was sent to is sufficient.
- ☐ 9. Copy of Development Agreement
If a development agreement is required, please submit a copy with the base year packet.
IF NO DEVELOPMENT AGREEMENT IS SIGNED, NO CASH GRANTS MAY BE PAID.
- ☐ 10. Proof that a public hearing notice was sent to the other taxing entities before it was published
Include copies of cover letters sent with the notices or a clerk's certification that they were sent on time. Wisconsin Statutes require notice to be sent by 1st class mail. Fax is **not** sufficient.
Cash grants paid to land owners, lessees or developers as part of the development agreement must be identified in the public hearing notice.

Questions about completing the forms and other items should be directed to Susan Plakus (608) 261-5335, Josh Dukelow (608) 266-5516 or Judie Gibbon (608) 266-5708; or email to tif@dor.state.wi.us; or check the DOR TIF web page at www.dor.state.wi.us/slf/tif.html

- ☐ 11. A map of the district with the outer boundaries clearly marked and parcels numbered – A PDF may be submitted. See standards on web page.
- Submit a map of the district with all TID parcels numbers marked on it. It must have boundaries clearly shown and be large enough so the parcel numbers can be easily read. These numbers must be identical to those on the TID parcel lists. (Include 2 paper copies or 1 file)
- ☐ 12. Copy of Planning Commission Resolution or minutes approving TID
- ☐ 13. Copy of Creation Resolution – must be adopted no less than 14 days after public hearing. Please see the Creation Resolution Checklist for all required resolution findings (PE-222).
- ☐ 14. Boundary description of the district – a Word 97 file can be submitted. See web page standards.
- Submit the district boundary description as adopted in the creation resolution. It must be a “metes and bounds” type description, not just a listing of lots and blocks, that describes the district’s outer boundaries.
- ☐ 15. Joint Review Board resolution – must occur within 30 days after receiving the creation resolution and include a positive assertion that development would not occur without TID creation.
- Submit a copy of the Joint Review Board resolution approving the TID creation. Also note that the Joint Review Board must submit its decision to the city no later than 7 days after making it.
- ☐ 16. Project Plan Resolution – This may be incorporated into the creation resolution if desired.
- Submit a copy of the resolution passed by the local legislative body approving the project plan.
- ☐ 17. Project Plan – a Word 97 file can be submitted. See web page standards.
- Submit a copy of the project plan. Be certain that it contains the following items:
- ✦ A statement listing the kind, number and location of all proposed public works or improvements
 - ✦ An economic feasibility study
 - ✦ A description of the methods of financing all estimated costs and the time when the costs or monetary obligations are to be incurred
 - ✦ A detailed list of project costs
 - ✦ Any proposed changes of zoning ordinances, master plan, map, building codes, and city ordinances
 - ✦ A list of estimated non-project costs
 - ✦ A statement of the proposed method for relocation of any person to be displaced
 - ✦ A statement indicating how the creation of the tax incremental district promotes the orderly development of the city
 - ✦ An opinion of the city attorney or of an attorney retained by the city as to whether the project plan is complete and complies with this section
 - ✦ Maps showing:
 - ✧ Existing uses and conditions of real property in the district
 - ✧ Proposed improvements and uses therein.
- ☐ 18. Tax Incremental Financing Remittance Fee – (PA-480)
- Submit \$1,000 fee check separately to Drawer Number 93826, Milwaukee, WI 53293-0826. Make check payable to the Wisconsin Department of Revenue.

All of these items should be returned before December 31 based on the year of creation (Example: Resolution 10/1/04 thru 9/30/05 due 12/31/05.) to:

Wisconsin Department of Revenue
Attn: Tax Incremental Finance, MS 6-97
PO Box 8971
Madison, WI 53708-8971